

ProjectWise Deliverables Management Workflow

NOTE:

Organization = Company registered with Bentley

Transmittal = Data sent outside of organization (Outgoing)

RFI = Request For Information

Submittal = Data received into an organization (Incoming)

Participants = Someone assigned to a project. Can be an internal or external participant

Draft = A partially completed package that can be edited prior to being transmitted

Package = Proposed set of documents being transmitted or submitted

Remember: The sending user issues a **Transmittal**, and the receiving user receives a **Submittal**.

Additional Reviewers – Internal

Internal GDOT Reviewers:

To navigate back to the package:

- Select any of the READ-ONLY versions (📖) of the files associated with this package.
- Click on the **Deliverables Management** tab in the window at the bottom of the screen.
- Click on the **Subject** link in the **Related packages** window.

The screenshot shows the ProjectWise interface with the 'Deliverables Management' tab selected at the bottom. A red arrow labeled 'b' points to this tab. Below the tab, the 'Responses' section is visible, followed by a table with columns: 'In response to', 'Recipient', 'Response', and 'Attachments'. Below this is a 'Related packages' section with a table containing the following data:

ID	Subject	Purpose
_987654-SM-0000010	Reviewers2	For Review

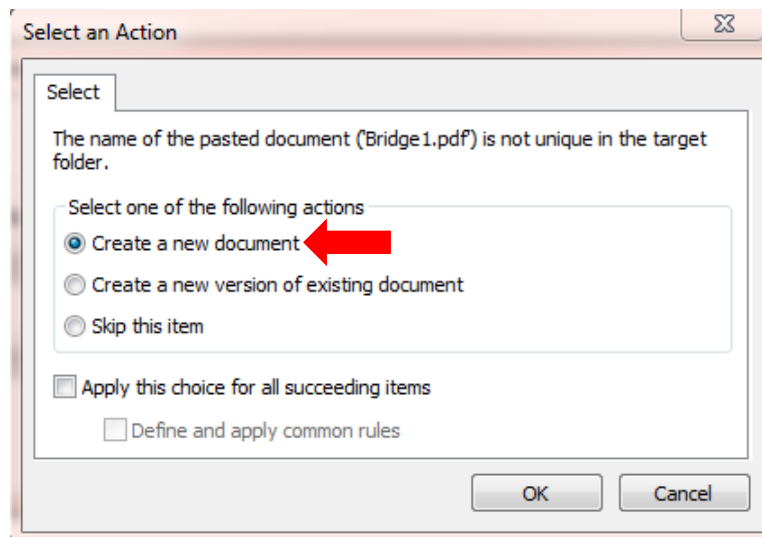
A red arrow labeled 'c' points to the 'Reviewers2' link in the 'Subject' column.

- **Send Request for Additional Review:**
 - a. Click on the **My Response** tab.
 - b. Select the files you want to send for review.
 - c. Click on the **Add Reviewers...** button at the top.
 - d. Select the desired reviewers from the list. (Use the *Search Users* option in the top right corner of the dialog for faster results.)
 - e. Click on **Add Selected**.
 - f. Set the **Due date** for the review and enter any comments (**Message**) you may have.
 - g. Click on **Send request**. (Additional reviewer will be notified by email that they have files to review)
 - h. To see the status of additional reviewers, click on the file and then on the **Additional reviewers** tab below.

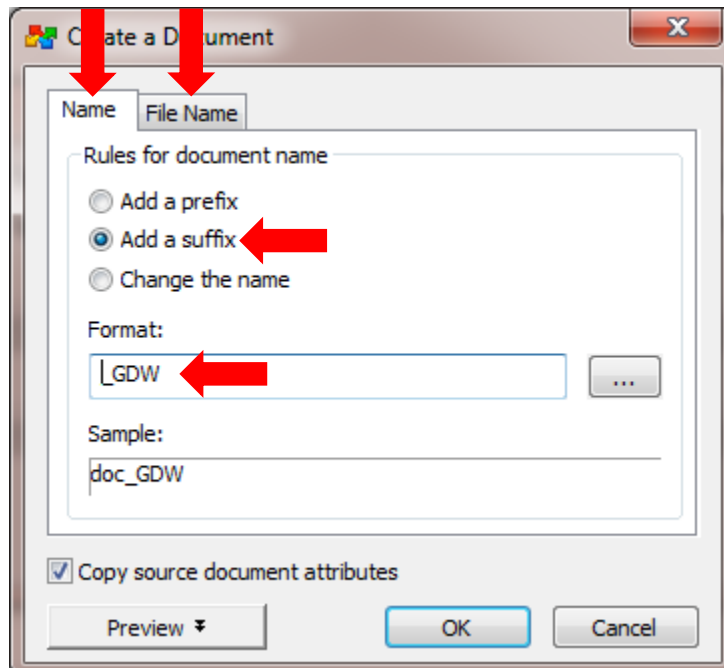
The screenshot shows a software interface with a file list at the top and a tabbed view below. The file list has columns for file name, status, user count, and file ID. The file '654321_0006.pdf' is highlighted, and a red arrow points to it. Below the file list, there are two tabs: 'My response' and 'Additional reviewers'. The 'Additional reviewers' tab is selected, and a red arrow points to it. Below the tabs, there is a table with columns: Reviewer, Response, Attachments, Comment, Respond until, and Last edited. The table contains one row with the reviewer 'hforney@dot.ga.gov', a 'Response pending' status, and a 'Respond until' date of '10/19/2016 10:33 AM'.

Reviewer	Response	Attachments	Comment	Respond until	Last edited
hforney@dot.ga.gov	Response pending			10/19/2016 10:33 AM	

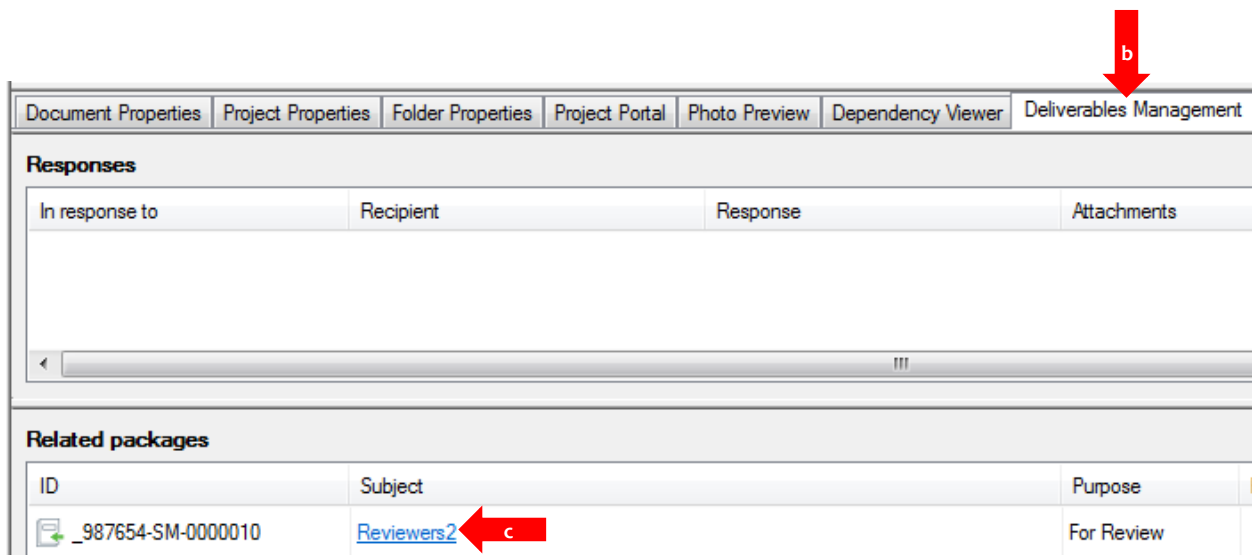
- **Review by Additional Internal Reviewer:**
 - a. The internal reviewer will receive an email alert they have a new package for review
 - b. Copy the ProjectWise link from the email and paste it in the ProjectWise Explorer address bar.
 - c. Click on the link for the highlighted package.
 - d. When the package opens, click on the ***My response*** tab to determine which files you are responsible for reviewing.
 - e. Right-click on the file and select ***Go to folder to review.***
 - f. You will be taken to the READ-ONLY version of the file.
 - g. With the READ-ONLY version of the files selected, right-click and select ***Copy.***
 - h. Right-click and select ***Paste.***
 - i. When prompted whether you want to copy the documents, select ***Yes.*** (If you are prompted about the files having versions, select ***No.***)
 - j. Since the files you are pasting already exist, you will be prompted to select an action to perform on the files. Select to ***Create a new document*** and click on ***OK.***



- k. Under both the ***Name*** and ***File Name*** tabs, Make sure ***Add a suffix*** is selected and then enter underbar and your initials (_GDW) in the ***Format*** field and click on ***OK.*** If you are copying/pasting multiple files, you will be prompted with the same dialog for each file, but you just have to click on ***OK*** since the ***Format*** field will already be auto-populated each time.



- I. Perform a detailed review on the files with your initials and check in the files when complete.
- m. To navigate back to the package:
 - a) Select any of the READ-ONLY versions () of the files associated with this package.
 - b) Click on the **Deliverables Management** tab in the window at the bottom of the screen.
 - c) Click on the *Subject* link in the **Related packages** window.



- n. Click on the **My response** tab.
- o. Select a document to respond to.
- p. Select a **Response** from the drop-down.
- q. Place any comments in the **Comment** field.
- r. (If applicable) Select **Browse** to navigate to the company submittal documents folder and select the document to attach.

File name	Version	State	Description	Response	Additional reviewers	Name	Application	File Size	Out to	File Updated	Created	Created By	Storage	Folder Name	Updated By
654321_0005.pdf				Approved with comments	1	654321_0005.pdf		247427							
654321_0005.pdf				Response pending	1	654321_0005.pdf		45047							

My response

Response: Approved with comments

Comment: See mark-ups in file

Attachments: 654321_0005_GDW.pdf

Browse

- s. After the review is complete, click on **Send responses** in the bottom right corner.
- t. Click **Close**.

○ **Receive Response from Internal Additional Reviewer:**

- An email alert will be received stating that an additional review response has been received.
- Copy the ProjectWise link from the email and paste it in the ProjectWise Explorer address bar.
- Click on the link for the highlighted package.
- When the package opens, click on the ***My response*** tab.
- Select a file (1) to open the comments below (2) and to review the attached files (3) (if applicable).

Documents | Scheduling | Audit Trail | Responses | **My response** ← **d**

ences (0 folders). Responded items: 0. Response pending items: 1.

File name	Version	State	Description	Response	Additional reviewers	Name
654321_0004.pdf ← e (1)				Response pending	1	654321_0004.pdf

My response | Additional reviewers | Attributes

Response: **Response pending**

Comment:

Haaziq Forney(hforney@dot.ga.gov) ← **e (2)**
 Response: Approved with comments
 Comment: Please make changes as shown on markups
 Attachments(1): 654321_0004.pdf

Attachments: 654321_0004.pdf × ← **e (3)**

Return to the document entitled ***2_GDOT_Response to Submittals*** for continuation of response (***Step 10***).